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## Uruguay

## Livestock and Products

## Annual

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### Report Highlights:

Uruguayan beef exports in 2003 are expected to increase from 240,000 MT to 250,000 MT due to larger production and stable domestic consumption. FMD is under control in Uruguay with key export markets reopened although the NAFTA countries remain closed. Cattle exports in 2003 are estimated to rebound slightly with the reopening of additional export markets, and gradually recuperating cattle prices in Argentina. Cattle stocks in 2003 will continue to increase as calf crop is again expected to more than offset a larger slaughter.

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
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## SECTION I. SITUATION AND OUTLOOK

### Trade

Uruguayan beef exports for 2003 are expected at 250,000 MT, an increase of 10,000 MT from 2002. Larger production with stable domestic consumption will increase export supplies while additional key export markets are expected to continue to reopen, after the FMD outbreak in April 2001. During the past four years, Uruguay has been undergoing a deep recession as a consequence of the Brazilian economic crisis first, followed by the economic and political crisis in Argentina in early 2002. The agricultural activity, primarily beef production, is the only sector which showed some improvement, especially after devaluation of the Uruguayan Peso in June 2002, which made Uruguayan exporters become more competitive.

The Government of Uruguay (GOU) is making strenuous efforts towards the definitive eradication of FMD, whose last outbreak was detected on August 21, 2001. As of August 2002, 56 export markets have reopened to fresh boneless beef, beginning with the European Union (EU) and Israel in November 2001. However, additional markets - including the most important American markets - have yet to open. Uruguayan animal health authorities are planning to vaccinate all cattle again in 2003, and will not discontinue vaccination until there is a regional agreement on how FMD eradication will be handled. In July 2002, a NAFTA sanitary mission carried out a risk assessment in Uruguay which proved highly successful in demonstrating that FMD is under control. Most expect that Canada will be reopened for fresh boneless beef by the end of 2002 and that the U.S. will follow later by the end of 2003. In addition, the once promising markets for Uruguay's high value beef cuts before the FMD crisis, Japan-Korea, are not expected to resume exports while the country continues vaccinating.

Uruguay's 6,300 MT Hilton beef quota to the EU was not affected by the sanitary crisis. However, the GOU requested an additional quota of 2,300 MT for July 2002-June 2003 arguing the increase was merited on the basis that the country is facing a difficult economic situation and is still trying to counteract the effects of the FMD crisis. The EU temporarily rejected this request but will reconsider it at a later date. (The 10,000 MT increase of Argentina's Hilton beef quota will adversely impact on the Uruguayan beef sector since both countries share export markets. This adds to the serious Argentine economic situation following devaluation at the beginning of 2002 making Uruguay become less and less competitive.)

Beef exports for 2002 are estimated at 240,000 MT. Uruguay's beef exports increased slightly to 118,387 MT in January-June 2002 compared with 102,205 MT during the same period in 2001 (almost all markets were open until late April) as a result of the reactivation of the beef sector through the reopening of various export markets led by the EU and Israel. Uruguay had to aggressively search for non-traditional markets to compensate for the loss of the most important beef destinations, such as the United States and Canada. The following table includes Uruguayan primary beef export markets:

(MT - CWE)

| Country        | Jan-June 2002 | Country        | Jan-June 2001 |
|----------------|---------------|----------------|---------------|
| Israel         | 23,654        | Canada         | 21,183        |
| United Kingdom | 15,867        | Israel         | 17,744        |
| Brazil         | 14,096        | United States  | 15,790        |
| Egypt          | 9,727         | Brazil         | 13,206        |
| Algeria        | 9,090         | United Kingdom | 6,412         |
| Russia         | 5,598         | Argentina      | 5,509         |
| Germany        | 4,436         | Mexico         | 3,392         |

Cattle exports are expected to rebound slightly in 2003 with the reopening of additional export markets, and gradually recuperating cattle prices in Argentina. Exports in 2002 are not expected to be significant primarily because of FMD but also due to more competitive prices in Argentina, Uruguay's main export destination, which will force producers to retain animals in the field. In the case of Argentina, there is no sanitary impediment to export as long as cattle go to slaughter. However, the Argentine devaluation added to the lack of commercial guarantees due to the economic crisis, make it impossible to do business with this partner. Other countries which reopened their markets to Uruguayan cattle are Peru, Venezuela, and Ecuador.

Since Uruguay has traditionally been a large beef exporter, in 2003 no significant beef volumes are estimated to be imported into the country. Some private sources reported that supermarkets are importing beef from Argentina taking advantage of lower prices after devaluation in January 2002. This trend is expected to be temporary since Argentine beef prices are expected to increase. During January-July 2002, it imported \$425,000 worth of chilled boneless beef and \$200,000 of frozen boneless beef from Argentina, and \$105,000 of thermoprocessed beef from Brazil and Argentina. In 2001, Uruguay imported \$192,000 worth of thermoprocessed beef from Brazil and Argentina. Uruguay has a 5.5 percent export rebate for boneless beef; 2.25 percent for bone-in beef and between 4.5 percent and 6 percent for thermoprocessed beef. As a Mercosur member, Uruguay applies the common external Mercosur tariff which ranges from 3 to 23 percent. In general, intra-Mercosur trade pays no tariffs.

The Uruguayan National Meat Institute (INAC) is actively developing a certified natural beef pilot project for which a certification protocol was designed. Its ultimate goal is to certify 95 percent of the country's total beef production. Both the GOU and beef exporters expect that this project will serve as a tool to help them differentiate Uruguayan beef in international markets.

Note: Exports in carcass weight equivalent (CWE) differ from Uruguay's official data/estimates as FAS applies an average conversion ratio of 1.36 to product weight volumes. As a result, CWE exports in PS&D are lower than those estimated in Uruguay. Therefore, this

also affects domestic consumption data, increasing it. INAC's conversion ratios are: 2.4 for thermoprocessed beef; 1.02 for frozen/chilled bone-in beef; and 1.6 for frozen/chilled boneless beef.

## **Production**

Cattle stocks in 2003 are projected to continue to increase as calf crop is again expected to more than offset a larger slaughter (plus losses). Slaughter is expected to grow, especially with higher prices and the reopening of the NAFTA market. Larger calf-crops in the past few years resulted from improved herd management techniques and good pastures. The closing of important export markets to Uruguayan beef, low cattle prices, good weather conditions, and the country's financial crisis encouraged producers to retain animals in the ranches during winter 2002 awaiting an improvement of the overall situation.

Beef production is forecast at 441,000 MT for 2003, 20,000 MT higher than in 2002, due to an expected increase in slaughter and improved export conditions following the expected reopening of the NAFTA market. Currently, Uruguayan producers are undergoing a serious financial situation due to declining prices and lack of credit resulting from the deteriorating economic crisis affecting the country during the past few months.

Uruguayan beef production is mainly oriented towards supplying export markets, which account for an average of 60 percent of production. During the past few years, there were significant investments in pastures and management improvements to slaughter cattle at a younger age. The weaning ratio was estimated at approximately 73 percent in 2001. Feedlot production represents only 5-7 percent of the total slaughter and it mainly supplies the Uruguayan domestic market through supermarket chains. It is not expected to grow because of higher grain prices, cattle price uncertainty and a four-year recession in the Uruguayan market, which does not pay a premium for it.

Producers have high expectations that cattle prices will recover after the NAFTA countries reopen their markets. This will also depend largely on the recuperation of Argentine cattle prices. Prices of live steer declined from \$0.77 in March 2001, before the FMD crisis, to \$0.55 in July 2002 due to oversupply during the first few months of 2002 and reduced slaughter as a consequence of difficulties in reopening markets. During the last couple of months, prices have remained stable because producers decided to retain cattle mainly as a consequence of the financial crisis in Uruguay.

## **Consumption**

In 2003, beef domestic consumption is expected to increase to 191,000 MT from 184,000 MT in 2002 as a consequence of increased beef production and the country's gradual recuperation from the economic recession. Annual per capita beef consumption in Uruguay is estimated at approximately 60 kg., the second highest in the world after Argentina, poultry consumption: 16 kg., and pork and lamb consumption is relatively small. Beef is mainly consumed in urban areas and lamb in rural areas. All beef cuts are popular in Uruguay; however, demand for lower priced forequarter cuts increased due to the economic recession. Estimated comparative consumer prices are as follows: tenderloin \$9/kg,

and round eye \$4/kg. Chicken is \$2/kg. In general, consumers with a higher purchasing power buy beef cuts in supermarkets (25-30 percent market share) where prices are more expensive, while less affluent consumers buy in butcher shops (70-75 percent market share).

#### **Useful web sites**

<http://www.inac.gub.uy>(National Meat Institute)

<http://www.uruguaymeat.gub.uy> (National Meat Institute - Beef Promotion Program)

<http://www.mgap.gub.uy/opypa/> (Ministry of Livestock, Agriculture, and Fisheries)

<http://www.ine.gub.uy> (National Statistics Institute)

<http://www.aduanas.gub.uy> (Uruguayan Customs)

Newspapers containing agricultural supplements:

<http://www.diarioelpais.com.uy> (El Pais Newspaper)

<http://www.observa.com.uy> (El Observador Newspaper)

**II. SECTION II. STATISTICAL TABLES**

|                             |                     |         |             |         |                          |         |
|-----------------------------|---------------------|---------|-------------|---------|--------------------------|---------|
| PSD Table                   |                     |         |             |         |                          |         |
| Country                     | Uruguay             |         |             |         |                          |         |
| Commodity                   | Meat, Beef and Veal |         |             |         | (1000 MT CWE)(1000 HEAD) |         |
|                             | Revised             | 2001    | Preliminary | 2002    | Forecast                 | 2003    |
|                             | Old                 | New     | Old         | New     | Old                      | New     |
| Market Year Begin           |                     | 01/2001 |             | 01/2002 |                          | 01/2003 |
| Slaughter (Reference)       | 1600                | 1322    | 1650        | 1720    | 0                        | 1800    |
| Beginning Stocks            | 0                   | 0       | 0           | 0       | 0                        | 0       |
| Production                  | 370                 | 317     | 380         | 421     | 0                        | 441     |
| Intra EC Imports            | 0                   | 0       | 0           | 0       | 0                        | 0       |
| Other Imports               | 0                   | 0       | 0           | 3       | 0                        | 0       |
| TOTAL Imports               | 0                   | 0       | 0           | 3       | 0                        | 0       |
| TOTAL SUPPLY                | 370                 | 317     | 380         | 424     | 0                        | 441     |
| Intra EC Exports            | 0                   | 0       | 0           | 0       | 0                        | 0       |
| Other Exports               | 144                 | 145     | 139         | 240     | 0                        | 250     |
| TOTAL Exports               | 144                 | 145     | 139         | 240     | 0                        | 250     |
| Human Dom. Consumption      | 226                 | 172     | 241         | 184     | 0                        | 191     |
| Other Use, Losses           | 0                   | 0       | 0           | 0       | 0                        | 0       |
| TOTAL Dom. Consumption      | 226                 | 172     | 241         | 184     | 0                        | 191     |
| Ending Stocks               | 0                   | 0       | 0           | 0       | 0                        | 0       |
| TOTAL DISTRIBUTION          | 370                 | 317     | 380         | 424     | 0                        | 441     |
| Calendar Yr. Imp. from U.S. | 0                   | 0       | 0           | 0       | 0                        | 0       |
| Calendar Yr. Exp. to U.S.   | 36                  | 36      | 0           | 0       | 0                        | 0       |

|                             |                              |         |             |         |                |         |
|-----------------------------|------------------------------|---------|-------------|---------|----------------|---------|
| PSD Table                   |                              |         |             |         |                |         |
| Country                     | Uruguay                      |         |             |         |                |         |
| Commodity                   | Animal<br>Numbers,<br>Cattle |         |             |         | (1000<br>HEAD) |         |
|                             | Revised                      | 2001    | Preliminary | 2002    | Forecast       | 2003    |
|                             | Old                          | New     | Old         | New     | Old            | New     |
| Market Year Begin           |                              | 01/2001 |             | 01/2002 |                | 01/2003 |
| Total Cattle Beg. Stks      | 10423                        | 10423   | 10653       | 11667   | 11093          | 12337   |
| Dairy Cows Beg. Stocks      | 380                          | 380     | 380         | 380     | 0              | 380     |
| Beef Cows Beg. Stocks       | 3500                         | 3806    | 3550        | 3780    | 0              | 3750    |
| Production (Calf Crop)      | 2050                         | 2800    | 2300        | 2600    | 0              | 2500    |
| Intra EC Imports            | 0                            | 0       | 0           | 0       | 0              | 0       |
| Other Imports               | 0                            | 0       | 0           | 0       | 0              | 0       |
| TOTAL Imports               | 0                            | 0       | 0           | 0       | 0              | 0       |
| TOTAL SUPPLY                | 12473                        | 13223   | 12953       | 14267   | 11093          | 14837   |
| Intra EC Exports            | 0                            | 0       | 0           | 0       | 0              | 0       |
| Other Exports               | 20                           | 14      | 10          | 10      | 0              | 15      |
| TOTAL Exports               | 20                           | 14      | 10          | 10      | 0              | 15      |
| Cow Slaughter               | 720                          | 550     | 755         | 830     | 0              | 825     |
| Calf Slaughter              | 35                           | 22      | 35          | 40      | 0              | 35      |
| Other Slaughter             | 845                          | 750     | 860         | 850     | 0              | 940     |
| Total Slaughter             | 1600                         | 1322    | 1650        | 1720    | 0              | 1800    |
| Loss                        | 200                          | 220     | 200         | 200     | 0              | 200     |
| Ending Inventories          | 10653                        | 11667   | 11093       | 12337   | 0              | 12822   |
| TOTAL DISTRIBUTION          | 12473                        | 13223   | 12953       | 14267   | 0              | 14837   |
| Calendar Yr. Imp. from U.S. | 0                            | 0       | 0           | 0       | 0              | 0       |
| Calendar Yr. Exp. to U.S.   | 0                            | 0       | 0           | 0       | 0              | 0       |

|               |                     |                      |          |
|---------------|---------------------|----------------------|----------|
| Prices Table  |                     |                      |          |
| Country       | Uruguay             |                      |          |
| Commodity     | Meat, Beef and Veal |                      |          |
| Prices in     | US\$                | per uom              | KG       |
|               |                     |                      |          |
| Year          | 2001                | 2002                 | % Change |
| Jan           | 1.65                | 1.29                 | -21.82%  |
| Feb           | 1.68                | 1.29                 | -23.21%  |
| Mar           | 1.7                 | 1.29                 | -24.12%  |
| Apr           | 1.67                | 1.25                 | -25.15%  |
| May           | 1.66                | 1.27                 | -23.49%  |
| Jun           | 1.47                | 1.19                 | -19.05%  |
| Jul           | 1.44                |                      | -100.00% |
| Aug           | 1.29                |                      | -100.00% |
| Sep           | 1.15                |                      | -100.00% |
| Oct           | 1.19                |                      | -100.00% |
| Nov           | 1.23                |                      | -100.00% |
| Dec           | 1.21                |                      | -100.00% |
|               |                     |                      |          |
| Exchange Rate | 26.5                | Local currency/US \$ |          |

|               |                              |                            |          |
|---------------|------------------------------|----------------------------|----------|
| Prices Table  |                              |                            |          |
| Country       | Uruguay                      |                            |          |
| Commodity     | Animal<br>Numbers,<br>Cattle |                            |          |
| Prices in     | US\$                         | per uom                    | KG       |
|               |                              |                            |          |
| Year          | 2001                         | 2002                       | % Change |
| Jan           | 0.76                         | 0.55                       | -27.63%  |
| Feb           | 0.77                         | 0.56                       | -27.27%  |
| Mar           | 0.77                         | 0.56                       | -27.27%  |
| Apr           | 0.75                         | 0.55                       | -26.67%  |
| May           | 0.68                         | 0.52                       | -23.53%  |
| Jun           | 0.66                         | 0.53                       | -19.70%  |
| Jul           | 0.65                         | 0.55                       | -15.38%  |
| Aug           | 0.63                         |                            | -100.00% |
| Sep           | 0.6                          |                            | -100.00% |
| Oct           | 0.61                         |                            | -100.00% |
| Nov           | 0.59                         |                            | -100.00% |
| Dec           | 0.57                         |                            | -100.00% |
|               |                              |                            |          |
| Exchange Rate | 26.5                         | Local<br>currency/US<br>\$ |          |

| Uruguay<br>BEEF EXPORTS<br>(metric tons) |        |        |        |        |        |        |        |          |
|--|--------|--------|--------|--------|--------|--------|--------|----------|
| Fresh/Chilled                            |        |        |        |        |        |        |        | Jan-July |
| Destination                              | 1995   | 1996   | 1997   | 1998   | 1999   | 2000   | 2001   | 2002     |
| Algeria                                  |        |        |        |        |        |        |        | 0        |
| Argentina                                | 2,630  | 5,753  | 6,583  | 20,459 | 8,997  | 8,044  | 7,197  | 2733     |
| Brazil                                   | 13,360 | 31,252 | 52,770 | 37,944 | 14,386 | 19,738 | 10,050 | 2996     |
| Canada                                   | 0      | 0      | 22     | 0      | 111    | 89     | 75     | 0        |
| Canary Island                            |        |        |        |        |        |        | 188    | 305      |
| Chile                                    | 1,157  | 1,189  | 3,419  | 6,750  | 4,907  | 4,372  | 1,248  | 3214     |
| Egypt                                    |        |        |        |        |        |        |        | 0        |
| European Union                           | 4,442  | 6,480  | 6,827  | 6,982  | 7,805  | 6,719  | 5,380  | 4899     |
| Faroe Islands                            | NA     | 0      | 0      | 0      | 3      |        | 0      | 0        |
| Guatemala                                | 0      | 0      | 0      | 0      | 0      | 39     | 0      | 0        |
| Hong Kong                                | 0      | 0      | 0      | 0      | 0      | 13     | 0      | 0        |
| Israel                                   |        |        |        |        |        |        | 242    | 0        |
| Japan                                    | 0      | 0      | 0      | 0      | 1      | 1      | 0      | 0        |
| Mexico                                   | 0      | 0      | 0      | 41     | 942    | 4,071  | 19     | 0        |
| Netherlands Antilles                     | NA     | NA     | NA     | 355    |        |        | 0      | 0        |
| Panama                                   | 0      | 0      | 0      | 0      | 487    | 0      | 0      | 0        |
| Paraguay                                 | 74     | 4      | 215    | 0      | 0      | 98     | 0      | 0        |
| Russia                                   |        |        |        |        |        |        |        | 0        |
| Saudi Arabia                             | 186    | 286    | NA     | 99     | 125    | 118    | 0      | 10       |
| Switzerland                              | 203    | 30     | 116    | 166    | 187    | 166    | 20     | 0        |
| Turkey                                   | 80     | 0      | 0      | 0      | 0      | 0      | 0      | 0        |
| United States                            | 20     | 2,734  | 2,901  | 4,468  | 5,119  | 4,322  | 1,602  | 0        |
| Total                                    | 22,152 | 47,728 | 72,853 | 77,264 | 43,070 | 47,790 | 26,021 | 14157    |
| Frozen                                   |        |        |        |        |        |        |        | Jan-July |
| Destination                              | 1995   | 1996   | 1997   | 1998   | 1999   | 2000   | 2001   | 2002     |
| Albania                                  | NA     | 0      | 26     | 0      | 0      | 0      | 78     | 0        |
| Algeria                                  | 0      | 0      | 0      | 228    | 1,089  | 1,454  | 492    | 6684     |
| Argentina                                | 328    | 907    | 1,673  | 5,358  | 734    | 1,167  | 612    | 334      |
| Bahamas                                  |        |        |        |        |        |        | 74     | 0        |
| Bahrain                                  | NA     | NA     | NA     | NA     | NA     | 25     | 0      | 0        |
| Brazil                                   | 8,158  | 8,713  | 6,472  | 3,921  | 3,164  | 2,675  | 2,116  | 7369     |
| Bulgaria                                 | NA     | 0      | 426    | 878    | 100    | 0      | 127    | 0        |
| Cameroon                                 | 0      | 0      | 0      | 0      | 1      |        | 0      | 0        |
| Canada                                   | 0      | 138    | 8,303  | 1,044  | 14,887 | 24,527 | 23,263 | 0        |
| Canary Island                            |        |        |        |        |        |        | 2,069  | 2545     |
| Chile                                    | 1,189  | 2,134  | 4,497  | 6,291  | 1,580  | 1,029  | 947    | 0        |
| China                                    |        |        |        |        |        |        | 1,112  | 0        |

|                    |        |        |        |        |        |        |        |       |
|--------------------|--------|--------|--------|--------|--------|--------|--------|-------|
| Croatia            | 0      | 15     | 0      | 0      | 0      | 25     | 0      | 0     |
| Cuba               |        |        |        |        |        |        | 228    | 0     |
| Cyprus             | 0      | 1      | 0      | 0      | 11     | 19     | 0      | 0     |
| Czech Republic     | 0      | 0      | 0      | 0      | 1      | 0      | 0      | 0     |
| Ecuador            | 0      | 0      | 0      | 17     | 0      | 0      | 0      | 0     |
| Egypt              | 0      | 633    | 0      | 859    | 0      |        | 356    | 7152  |
| European Union     | 16,740 | 14,411 | 22,534 | 19,674 | 11,991 | 9,911  | 10,875 | 11415 |
| French Guiana      | 12     | NA     | NA     | NA     | NA     | NA     | 0      | 0     |
| French Polynesia   | NA     | 14     | 0      | 0      | 6      | 13     | 0      | 0     |
| Gabon              | NA     | 3      | NA     | NA     | NA     | NA     | 0      | 0     |
| Greenland          | 0      | 0      | 0      | 0      | 9      | 15     | 0      | 0     |
| Grenada            | 0      | 0      | 0      | 0      | 16     | 32     | 0      | 0     |
| Guadeloupe         | 45     | NA     | NA     | NA     | NA     | NA     | 0      | 0     |
| Guatemala          | 0      | 0      | 0      | 0      | 86     | 382    | 0      | 0     |
| Hong Kong          | 1,460  | 1,346  | 1,187  | 748    | 933    | 744    | 0      | 0     |
| Hungary            | 0      | 0      | 0      | 0      | 0      | 0      | 17     | 0     |
| Israel             | 0      | 23,589 | 29,621 | 21,758 | 25,137 | 28,088 | 20,020 | 17389 |
| Jamaica            | NA     | 0      | 7      | 1      | 0      | 0      | 0      | 0     |
| Japan              | 0      | 0      | 0      | 234    | 1,420  | 6,881  | 0      | 0     |
| Jordan             | 0      | NA     | 91     | 0      | 0      | 0      | 130    | 0     |
| Kazakhstan         | NA     | NA     | NA     | 0      | NA     | 4      | 0      | 0     |
| Korea, Republic of | 0      | 0      | 0      | 0      | 0      | 4,653  | 0      | 0     |
| Latvia             |        |        |        |        |        |        | 250    | 0     |
| Macau              | 25     | 0      | 60     | 0      | 15     | 15     | 0      | 0     |
| Macedonia          | NA     | 0      | 0      | 50     | 0      |        | 0      | 0     |
| Malaysia           | 0      | 0      | 0      | 0      | 14     | 14     | 3      | 0     |
| Martinique         | 47     | NA     | NA     | NA     | NA     | NA     | NA     | 0     |
| Mexico             | 0      | 0      | 0      | 153    | 5,127  | 13,765 | 422    | 0     |
| Morocco            | 0      | 0      | 0      | 0      | 14     | 15     | 0      | 0     |
| Norway             | 0      | 0      | 0      | 0      | 8      | 3      | 0      | 0     |
| Paraguay           | 0      | 0      | 36     | 0      | 0      | 91     | 0      | 0     |
| Peru               | 420    | 81     | 391    | 308    | 55     | 26     | 81     | 0     |
| Poland             | 0      | 582    | 883    | 0      | 0      | 0      | 0      | 0     |
| Russia             | NA     | 0      | 0      | 1,190  | 219    | 1,246  | 0      | 4190  |
| Saudi Arabia       | 294    | 502    | NA     | 424    | 783    | 729    | 270    | 2106  |
| Senegal            | NA     | 0      | 0      | 1      | 0      | 14     | 148    | 0     |
| Singapore          | 1,122  | 776    | 852    | 104    | 0      | 150    | 242    | 0     |
| Slovenia           | 61     | 0      | 0      | 0      | 0      | 0      | 0      | 0     |
| South Africa       | 0      | 30     | 548    | 516    | 1,327  | 2,758  | 904    | 0     |
| Switzerland        | 1,155  | 504    | 464    | 297    | 95     | 132    | 15     | 0     |
| Trinidad & Tobago  | 0      | 0      | 0      | 28     | 0      | 1,228  | 0      | 0     |
| United States      | 107    | 17,548 | 16,852 | 8,964  | 15,808 | 14,013 | 7,552  | 0     |

|                    |             |             |             |             |             |             |             |                 |
|--------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-----------------|
| Venezuela          | 382         | 42          | 229         | 891         | 1,560       | 2,127       | 1,180       | 0               |
| Total              | 31,545      | 71,969      | 95,152      | 73,937      | 86,190      | 117,970     | 73,583      | 59184           |
| <b>Processed</b>   |             |             |             |             |             |             |             | <b>Jan-July</b> |
| <b>Destination</b> | <b>1995</b> | <b>1996</b> | <b>1997</b> | <b>1998</b> | <b>1999</b> | <b>2000</b> | <b>2001</b> | <b>2002</b>     |
| Argentina          | 0           | 0           | 0           | 382         | 1,448       | 1,922       | 0           | 0               |
| Barbados           | NA          | NA          | 130         | 105         | 0           | 0           | 0           | 0               |
| Brazil             | 8           | 19          | 698         | 1,347       | 563         | 160         | 151         | 0               |
| Canada             | 88          | 0           | 0           | 0           | 0           | 0           | 0           | 0               |
| Chile              | 0           | 0           | 0           | 0           | 0           | 17          | 0           | 0               |
| Cyprus             | 0           | 0           | 0           | 5           | 0           | 0           | 0           | 0               |
| European Union     | 4,799       | 3,991       | 5,452       | 4,684       | 6,165       | 4,276       | 4,078       | 2977            |
| Hong Kong          | 6           | 12          | 0           | 0           | 7           | 0           | 17          | 0               |
| Israel             |             |             |             |             |             |             |             | 5               |
| Jamaica            | NA          | 55          | 158         | 71          | 0           | 0           | 0           | 0               |
| Japan              | 69          | 13          | 0           | 0           | 0           | 0           | 0           | 0               |
| Malta              | 0           | 16          | 0           | 0           | 0           | 0           | 0           | 0               |
| Paraguay           | 1           | 3           | 3           | 0           | 0           | 0           | 0           | 0               |
| Peru               | 0           | 0           | 0           | 28          | 22          | 4           | 5           | 0               |
| Saudi Arabia       | 0           | 36          | NA          | 0           | 0           | 0           | 0           | 0               |
| South Africa       | 0           | 0           | 0           | 0           | 15          | 15          | 0           | 0               |
| Trinidad & Tobago  | 0           | 86          | 69          | 18          | 0           | 17          | 0           | 0               |
| United States      | 2,188       | 2,136       | 1,957       | 2,459       | 1,131       | 1,278       | 2,513       | 1720            |
| Total              |             |             |             |             |             |             |             | 4702            |
| Grand Total        | 60,856      | 126,064     | 176,472     | 160,300     | 138,611     | 173,449     | 106,368     | 78043           |
| Share to U.S. (%)  | 4%          | 4%          | 3%          | 5%          | 6%          | 4%          | 5%          | 0.02            |

Post's source for export statistics for 2001 and 2002 was the Uruguayan National Meat Institute (INAC)

Sources: U.N. Trade for 1995-2000 and trade data of major trade partners 1995-2001.

**Uruguay**  
**BEEF IMPORTS**  
**(metric tons)**

| Fresh/Chilled   |      |      |      |      |      |      |      | Jan-July |
|-----------------|------|------|------|------|------|------|------|----------|
| Origin          | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002     |
| Argentina       | 0    | 63   | 0    | 0    | 0    | 0    | 0    | 480      |
| Brazil          | 0    | 0    | 0    | 0    | 0    | 84   | 0    | 0        |
| Chile           | 0    | 0    | 0    | 0    | 10   | 0    | 0    | 0        |
| EU 15           | 1    | 0    | 0    | 1    | 0    | 0    | 0    | 0        |
| Panama          | 0    | 0    | 0    | 26   | 0    | 0    | 0    | 0        |
| United States   | 0    | 0    | 0    | 2    | 114  | 22   | 0    | 0        |
| Total           | 1    | 63   | 0    | 29   | 124  | 106  | 0    | 480      |
| US market share | 0%   | 0%   | 0%   | 7%   | 92%  | 21%  | 0%   | 0        |
| Frozen          |      |      |      |      |      |      |      | Jan-July |
| Origin          | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002     |
| Argentina       |      |      |      |      |      |      | 0    | 334      |
| Australia       | 0    | 0    | 0    | 379  | 0    | 0    | 0    | 0        |
| Brazil          | 0    | 0    | 0    | 0    | 20   | 0    | 0    | 0        |
| Canada          | 0    | 0    | 67   | 0    | 0    | 0    | 0    | 0        |
| EU 15           | 2    | 2    | 0    | 3    | 0    | 49   | 0    | 0        |
| New Zealand     | 0    | 0    | 0    | 16   | 0    | 0    | 0    | 0        |
| Paraguay        | 52   | 0    | 0    | 0    | 12   | 0    | 0    | 0        |
| United States   | 0    | 145  | 270  | 23   | 52   | 129  | 0    | 0        |
| Total           | 54   | 147  | 337  | 421  | 84   | 178  | 0    | 334      |
| US market share | 0%   | 99%  | 80%  | 5%   | 62%  | 72%  | 0%   | 0        |
| Processed       |      |      |      |      |      |      |      | Jan-July |
| Origin          | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002     |
| Argentina       | 6    | 73   | 9    | 10   | 4    | 5    | 4    | 20       |
| Brazil          | 74   | 72   | 31   | 35   | 60   | 53   | 94   | 54       |
| EU 15           | 0    | 1    | 0    | 0    | 32   | 0    | 0    | 0        |
| Paraguay        | 109  | 0    | 0    | 0    | 0    | 0    | 0    | 0        |
| United States   | 0    | 0    | 0    | 36   | 23   | 14   | 0    | 0        |
| Total           | 189  | 146  | 40   | 81   | 119  | 72   | 98   | 74       |

|                       |     |     |     |     |     |     |    |     |
|-----------------------|-----|-----|-----|-----|-----|-----|----|-----|
| US market share       | 0%  | 0%  | 0%  | 44% | 19% | 19% | 0% | 0   |
| Grand Total           | 244 | 356 | 377 | 531 | 327 | 356 | 98 | 888 |
| Total US market share | 0%  | 41% | 72% | 11% | 58% | 46% | 0% | 0   |

Sources: U.N. Trade for 1995-2000 and trade data of major trade partners 1995-2001.

Post's source for import statistics for 2001 and 2002 was Uruguayan Customs.